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Courtney N. Carr

ATTORNEY | PARTNER

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Overview

Courtney Carr provides comprehensive and personalized estate planning advice to high net worth individuals and their families to help them grow and protect multi-generational wealth. She specializes in developing customized estate plans for clients designed to minimize estate, gift, and generation-skipping transfer taxes and to meet each client's personal goals for wealth transfer.

Courtney invests in each client relationship and makes it a priority to personally get to know her clients and their families in order to provide the best advice and service to each of them. She works closely with her colleagues in the Wealth Management Group to provide integrated, customized family office services designed to meet the specific needs of each client family. These services include trust administration, investment management advice through Choate Investment Advisors, income and gift tax advice, and tax return preparation.

Related Services

Estate Planning

Philanthropic Planning

Professional Trustee and Administration Services

Education

- Suffolk University Law School, JD (2009) *summa cum laude*
  Articles Editor, *Suffolk University Law Review*
- Colby College, BA (2006) *magna cum laude*

Admissions

- Massachusetts
- U.S. Court of Appeals, First Circuit
- U.S. District Court, Massachusetts

Representative Engagements

- Regularly counsels clients on sophisticated strategies for lifetime asset transfer, including irrevocable trusts that benefit multiple generations of descendants, grantor retained annuity trusts ("GRATs"), qualified personal residence trusts ("QPRTs"), and family limited liability companies.
- Educates younger generations of families about estate planning, charitable giving, trusts, and wealth preservation, and helps facilitate discussions on such topics among members of multi-generational families.
- Represents lottery winners in connection with estate and financial planning and the unique challenges associated with winning.
- Assists families to develop mission statements and guidance for family governance and wealth

stewardship.

Publications and Presentations

- "Mapping Out Charitable Giving Plans," panelist, Massachusetts Continuing Legal Education, October 25, 2022
- "Finding a Fiduciary," presenter, Massachusetts Continuing Legal Education, October 29, 2021
- "Will and Trust Drafting Basic Plus," chair and presenter, Massachusetts Continuing Legal Education, 2020-2022
- "Revocable Trusts," presenter, Boston Bar Association
- "Estate and Gift Tax Marital Deductions," presenter, Massachusetts Continuing Legal Education

Professional & Community Involvement

- Member, Massachusetts Bar Association
- Member, Boston Bar Association
- Member, Board of Trustees of Worcester Academy, an independent school in Massachusetts